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ABSTRACT

Three aspects of the York Borough's school instructional programs are discussed: program structure, program costs, and program evaluation. Some basic philosophies of the Management of Educational Resources System (MERS) are set forth and the early history of the project is described showing how the boardwide MERS evolved from a pilot experiment centered around a computer-based planning system. The committee organizational structure is presented and the personnel composition of the committees described in detail. Comments are made regarding the staff training requirements of MERS, and a schedule of planned activities is pursued in detail. Finally, significant behavioral observations about MERS to date are noted. (Author)

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MANAGEMENT OF EDUCATIONAL RESOURCES SYSTEM
(MERS)

Progress Report
Number One

THE PLANNING, PROGRAMMING, BUDGETING, AND EVALUATION SYSTEM OF THE BOARD OF EDUCATION FOR THE BOROUGH OF YORK

THE BOARD OF EDUCATION FOR THE BOROUGH OF YORK
2 Trethewey Drive
Toronto 337, Ontario

EA 004 402

January 20, 1972.

PREFACE

Effective decision-making and planning for the allocation of limited resources is one of the critical matters facing school boards to-day. More sophisticated tools are required to assist in arriving at viable alternatives in the spending of public funds.

To meet the public demand for accountability of public expenditure, decision-making tools, such as the one being developed by the Board of Education for the Borough of York and described in this First Progress Report, are of paramount importance. The education environment to-day requires that administrators, educators and trustees be familiar with a systems approach to education matters, not merely to serve as another statistical device in sorting figures, but to emphasize the need and significance for planning and evaluating educational programs and for developing alternatives for the effective management of available resources, both human and financial.

The acronym MERS stands for the Management of Educational Resources System, and its application and development in the Borough of York schools will involve all board personnel, the members of the Board of Education and the community. The reason for its implementation is to promote and ensure the highest standard of educational program for the students in the system within the resources available to the Board.

Increasing pressures are on public school systems to provide quality education and expanded opportunity and curricula for students. The requirement that this be done within statutory limitations on education expenditures, compounded by the requirement to provide equality of opportunity and education within the metropolitan education system, demands that effective management techniques be devised to facilitate good decision-making at all levels of the educational structure so as to meet progressive requirements on the one hand and restraints on the other.

This progress report outlines to date the undertakings of the Board of Education for the Borough of York in implementing a realistic approach to meet such opposing requirements. The utility of a systems approach as a tool in decision-making has already been proven and endorsed by the Board of Education for the Borough of York. While the ultimate application of such an approach throughout the entire system will require a period of time to implement completely, it is our conviction that, as its concepts are perceived fully by all who work with it, MERS will enhance and support the classroom needs of the teacher in providing an optimum learning environment for students.

A.G. GILLESPIE
Director of Education.

January 20, 1972.

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1 - INTRODUCTION

MERS stands for the Management of Educational Resources System. It is the Planning, Programming, Budgeting and Evaluation System that the Board of Education for the Borough of York has chosen for implementation within its elementary and secondary schools. It is a management system involving all Board personnel designed to assist in making more effective decisions concerning the allocation of resources - staff, classroom space, and finances. Its sole purpose is to ensure the highest standard of curriculum programs for students in classrooms of the Borough of York for any given level of total budgetary expenditures.

PPBE systems for school boards are constructed on the premise that more rational curriculum decisions will be made if a sufficient amount of accurate data is collected to enable decision-makers to compare the costs and benefits of many feasible curriculum program alternatives. The degree of success expected within any PPBE system can be measured primarily along two dimensions. These are as follows: firstly, the degree to which the system has been imposed upon Board personnel without their active participation; and secondly, the degree of importance attached by Board decision-makers to the cost elements in decisions regarding the funding of curriculum program alternatives. The MER system is unique on both counts. In the first place, it attempts to ensure success by encouraging a participative, "bottom-up" flow of design and implementation ideas, along with a minimum amount of "top-down" leadership and direction. And

in the second place MERS encourages each school to retain its own individuality by attaching a substantial weighting factor to program evaluations by its individual school teachers in curriculum decisions, rather than creating an environment of fear and conformity by emphasizing curriculum program costs to the total exclusion of evaluative information. The individual school principal and his teachers play key roles within the MER system.

One of the benefits of a PPBE system like MERS is that it brings about the documentation of exactly what is occurring in the Borough of York classrooms today. This provides at least a concrete starting point for all Board personnel against which to measure their individual aspirations, and very soon, to begin the cyclical process of curriculum program re-evaluation that MERS aims to promote. From another standpoint, however, MERS is a management control system which the Board of Education for the Borough of York hopes will be able to provide the best possible educational system throughout future years of expenditure ceilings in Ontario. It is believed that the Ontario Department of Education hopes to persuade every school board in Ontario to adopt and implement a curriculum planning system such as MERS within the foreseeable future. Moreover, the Metropolitan Toronto School Board is anxious to build a planning system for managing the financial operations of its six member boards along a PPBES format, consistent with Department of Education guidelines. Thus far, the progress of the MERS project may have influenced both

these bodies in their policy formulations. It should be recognized that MERS represents a pioneering effort in school board planning, not only in Ontario, but also in the whole of North America.

2 - EARLY HISTORY

Interest in MERS arose as a result of discussions held in the Fall of 1969 between senior administrators in the Board of Education for the Borough of York and researchers from the Ontario Institute for Studies in Education and Systems Research Group, a management consulting company. As a result, the Borough of York gave approval to conduct a pilot project using procedures developed by the researchers and data collected from the operations of the York Borough School System.

Work on this pilot project began early in 1970 and concluded at the end of that year. Since this project proposed to use techniques that were largely untested in school systems, the main thrust of the study was directed at evaluating the practicality of these new procedures, and not at implementing them in the York Borough School System. During this pilot project, representatives from the Metropolitan Toronto School Board and Region Seven of the Ontario Department of Education, were kept abreast of developments.

Two main conclusions were drawn from the pilot project results. The first was a realization that PPBE systems in school boards cannot be effective unless they are carried out largely by personnel within the school systems themselves! Secondly,

the planning function in any school system cannot be limited to a small group of high level administrators, but rather must permeate the system as a whole and involve many diverse groups! This project has acted essentially as a catalyst in stimulating the York Board's own efforts in developing a planning and management system.

Spurred by the experience gained from this early work, the York Board decided to proceed with the development of its own system which it christened "MERS". Thus early in 1971, a steering committee named the MERS Planning Committee, composed of staff and officials of the Board of Education for the Borough of York, the Metropolitan Toronto School Board, O.I.S.E. and the Ontario Department of Education, was struck to direct the MERS project.

The MERS Planning Committee made two major policy decisions. One was that the best way of approaching a future structure for management planning is to document the current system. As a result work was begun in the Spring of 1971 on the description of the existing curriculum programs in the elementary schools of the Board of Education for the Borough of York. The other policy decision was that work can best be performed by committees composed of representatives from diverse interest groups both from within and without. Consequently, a number of working committees were struck.

A further decision was made during the Summer of 1971 to hire a project officer who would be responsible for co-ordinating

the many activities involved with the development of the MER System. A member of a management consulting company, Decision Systems Associates, was obtained for this position in the Fall of 1971. Currently, the MERS project officer, working closely with York's Research and Development Consultant, co-ordinates the project and carries out the directives of the MERS Planning Committee.

3 - COMPONENTS OF THE MER SYSTEM

In its current state of development, MERS is composed of a variety of activities, each of which encompasses one or more of the following six elements:

1. Goals
2. Curriculum Program Structure
3. Program Costs
4. Program Evaluations
5. Staff Training and Implementation
6. Overall MERS Control Processes

If the principal aim of MERS is to assist the York Borough in discovering its best possible educational configuration, it is necessary to have sets of goals to guide this search. There is a hierarchy of sets of goals within the York system, consisting of three levels. At the first level are system-wide goals of a more or less general nature. At the second one, there are more specific school goals. And at the third level, there are very specific individual classroom program goals. Goals at any one level must of course be consistent with those at any other level.

In order that alternative curriculum programs may be

compared with one another in an attempt to arrive at an optimal set of such programs, a meaningful classification or program structure must be developed. Once this has been accomplished, both cost and evaluative data should be collected according to formats that are compatible with this program structure.

The training of staff at all levels within the Board of Education for the Borough of York on a continual basis is necessary if the MERS implementation experience is to be a successful one. And finally, looking at the longer term aspects of MERS, control processes must be developed that will facilitate and encourage the continual re-evaluation of goals at all levels within the York Board, along with the parallel consideration of curriculum program alternatives to best meet these goals.

The remainder of this MERS Progress Report will begin with a description of the personnel and committee structures of MERS, and the ways in which responsibilities for the six elements of the MER system are delegated. Following this description, a concise statement of current progress and future plans will be presented for each of these six elements: goals, curriculum program structure, program costs, program evaluations, staff training and implementation, and overall MERS control processes.

4 - MERS PERSONNEL AND COMMITTEE STRUCTURE

As was mentioned earlier, the policy-making body of MERS is known as the MERS Planning Committee. Its directives

are carried out by both the MERS Project Officer and the Research and Development Officer, who are members of all other MERS Committees. Currently, there are six other committees: the Learner Characteristics Committee, the Community Communications Committee, the Secondary School Writers' Committee, the Elementary School Writers' Committee, the Implementation Committee, and the Budget Committee. Altogether, there are seven active committees now and more will be struck as project development proceeds.

Both the Accounting and Data Processing functions play active roles in the MER system. The liaison between these two areas and the MERS Planning Committee is performed by the MERS Project Officer. By the same token, each of the Borough's schools is involved in the system. The Research and Development Officer plays the prime liaison role at the individual school level. An organizational chart depicting the MERS control structure is found in Figure 1.

A closer examination of the MERS committees gives further insight into the total system structure. Table 1 summarizes the functions of each committee, while Table 2 displays the personnel composition of each.

An attempt is made in Figure 2 to show the activity area in which each MERS committee and interest group for the Borough of York is involved.

5 - GOALS

One possible way to design a practical planning

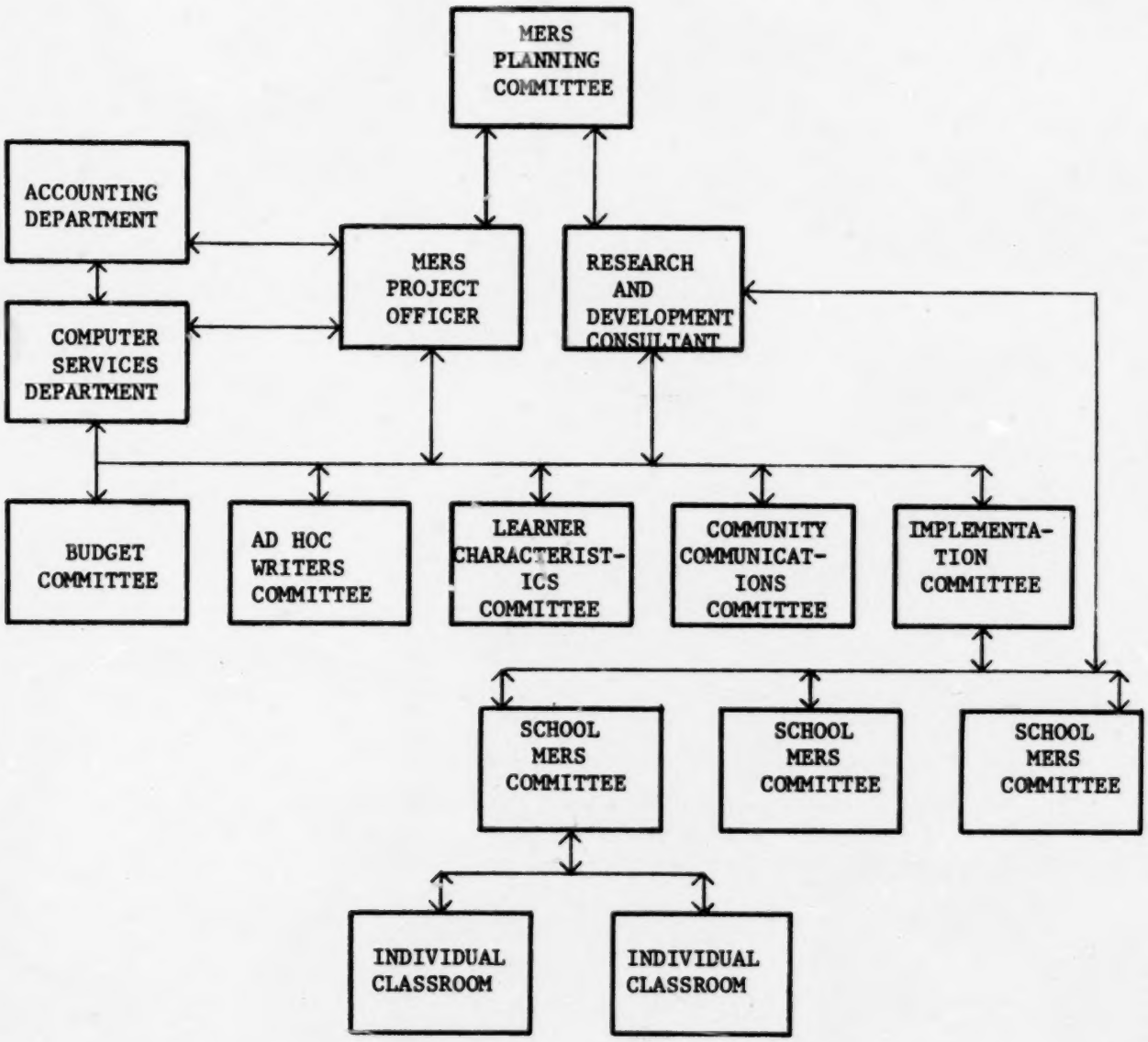


FIGURE 1

MERS CONTROL STRUCTURE

TABLE 1

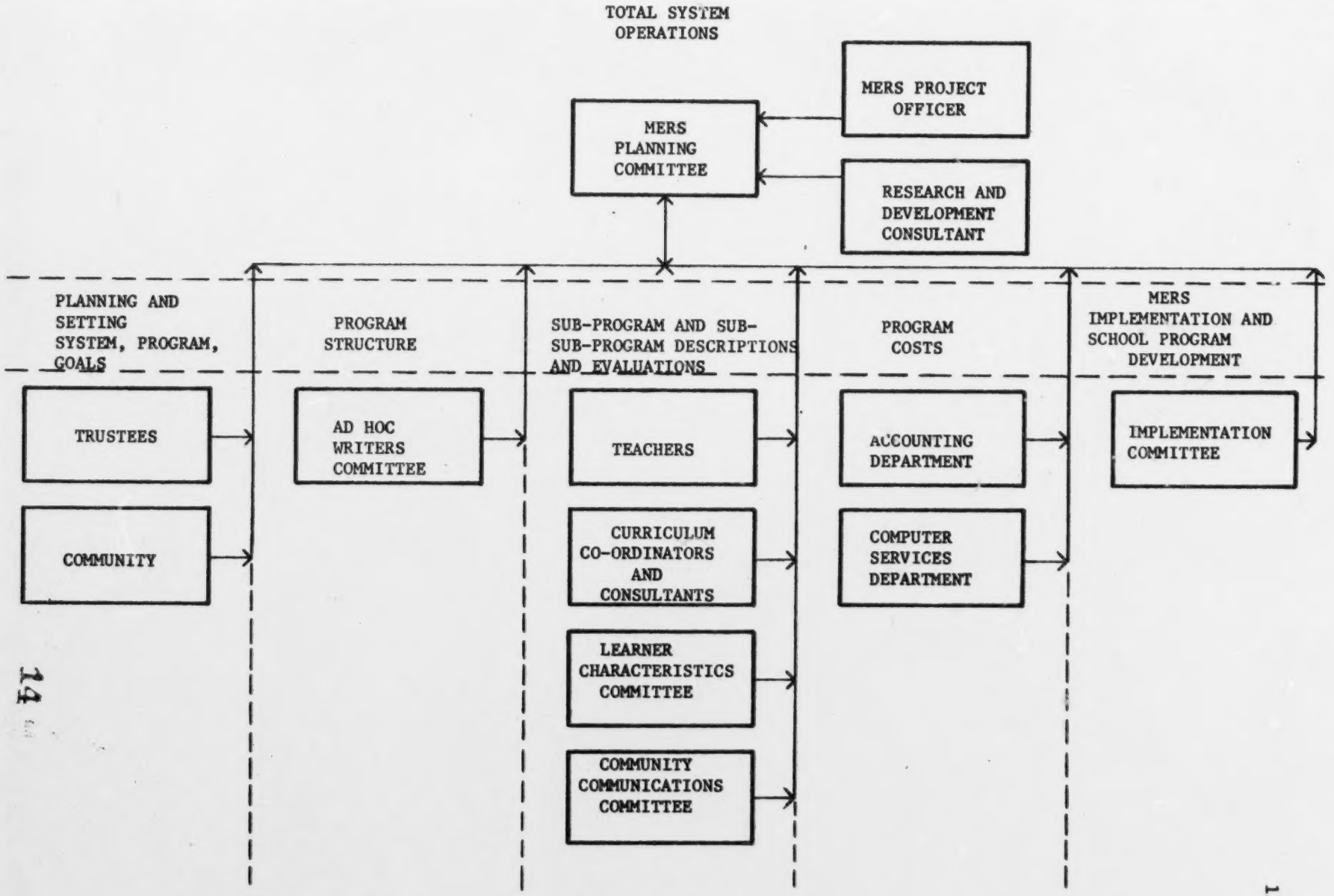
FUNCTIONS OF MERS COMMITTEES

COMMITTEE	SIZE	MEETINGS	FUNCTION	TASKS
MERS Planning Committee	17	at 3 week intervals	- overall direction of MERS project	- strikes sub-committees - co-ordinates sub-committees - liaison with Ontario Dept. of Education - liaison with Metropolitan Toronto School Board
Learner Characteristics Committee	10	monthly	- developing ways and means of acquiring information about the needs and characteristics of York's student population	- researches individual learner characteristics studies - sets up a resource information service for the York Board
Implementation Committee	25	at 3 week intervals	- developing instructional objectives on a school-to-school basis	- conducts orientation meetings with teachers - designs and implements training sessions for principals and teachers - guides the writing of individual teacher program descriptions, goals, objectives, and means of evaluation
Community Communications Committee	17	at call of chair	- developing two-way communication with Trustees, teachers, parents, and students about MERS, the school's programs, and related school environment topics	- obtains feedback from community about programs
Ad Hoc Secondary School Writers Committee	28	at call of chair	- providing written submissions containing goals, objectives, descriptions, and means of evaluation for secondary programs and sub-programs	- initial work has been completed
Ad Hoc Elementary School Writers Committee	21	at call of chair	- providing written submissions containing goals, objectives, descriptions, and means of evaluation for elementary programs and sub-programs	- initial work has been completed
Budget Committee	6	at call of chair	- preparation of Budget in MERS format	- preparation of documents and procedures - collection of data

	MERS PLANNING COMMITTEE	LEARNER CHARACTERISTICS COMMITTEE	IMPLEMENTATION COMMITTEE	COMMUNITY COMMUNICATIONS COMMITTEE	AD HOC SECONDARY SCHOOL WRITERS COMMITTEE	AD HOC ELEMENTARY SCHOOL WRITERS COMMITTEE	BUDGET COMMITTEE
O.I.S.E.	1	—	—	1	1	—	—
Metro Toronto School Board	1	—	—	—	—	—	1
Ontario Dept. of Education	1	1	1	1	—	—	—
Trustees	—	—	—	2	—	—	—
Director of Education	1	1	1	1	1	1	1
Superintendents and Asst. Superintendents	3	2	4	2	1	3	1
Co-ordinators and Consultants	3	1	7	—	7	10	—
Special Services Personnel	—	3	3	—	—	2	—
Research and Development	1	1	1	1	1	1	—
MERS Project Officer	1	1	1	1	1	1	1
Principals and Vice-Principals	3	1	4	4	3	—	—
Teachers	—	—	3	2	12	3	—
Accounting	1	—	—	—	—	—	1
Data Processing	1	—	—	—	—	—	1
Other Board Personnel	—	—	—	2	1	—	—
TOTAL	17	11	25	17	28	21	6

TABLE 2

COMPOSITION OF MERS COMMITTEES



MERS ORGANIZATION CHART

FIGURE 2

system like MERS is to start by setting out the goals of the total system and those of the individual schools. It was felt, however, that a more expedient way would be to start by establishing the curriculum program goals of the individual classroom teachers. Ultimately, all three sets of goals must exist and be re-evaluated on a continual basis, if MERS is to be a success. In the meantime, progress will be more rapid at the classroom level.

The Borough of York trustees have already agreed upon one system-wide educational goal, and are devoting time on their agendas of future meetings to continue this effort.

MERS encourages schools to be unique by adopting a decentralized manner of curriculum program evaluation. This presupposes that schools have individual school goals that will guide curriculum decision-making processes. Though no progress has been made to date in documenting school goals, it is expected that one task of the School MERS Planning Committee that will be established in the Spring of 1972 in each school of the Borough for the purpose of implementing MERS, will be to decide upon such goals.

At the curriculum program level, however, a first attempt at specifying goals has been completed. This work forms the basis for the program structure of the Board of Education for the Borough of York, which will be explained in the next section of this report.

6 - PROGRAM STRUCTURE

In any PPBE system, the program structure is a means of classifying the various activities within a school board that are selected to achieve that board's hierarchy of goals. The program structure provides the base for collecting and analysing both cost and evaluative information that will enter into curriculum program decision-making. Thus a structure must be general enough on the one hand to allow flexibility in the consideration of program alternatives, yet specific enough on the other hand to enable concrete data to be gathered. Most program structures consist of combinations of subject area and grade curricula. Rather than spending much time philosophizing about ideal program structures, the MERS Steering Committee decided to adopt the structure that generally prevails in the Borough of York at the present time. This program structure is shown in Table 3.

It can be seen from Table 3 that the current York Board structure consists of a three-fold breakdown of curriculum into school programs, sub-programs, and sub-sub-programs. The level of sub-sub-program entries will consist of the actual subject area - grade level combinations that exist in the classroom now. These entries will be finalized by June, 1972, at which time a description of the goals, objectives, and means of evaluating student progress that each individual teacher in the Board of Education for the Borough of York describes for himself will have been completed.

TABLE 3

A TENTATIVE PROGRAM STRUCTURE FOR SCHOOLS

IN YORK BOROUGH

FUNCTION	SCHOOL PROGRAM	SUB-PROGRAM	SUB-SUB-PROGRAM
INSTRUCTION			
Jr. Kindergarten	Jr. Kindergarten		
Sr. Kindergarten	Sr. Kindergarten		
Primary Division	Primary Division	Language Arts	
		Mathematics	
		Art	
		Music	
		French	
		Science	
		Physical Education	
		Health	
		Social Studies	
Junior Division	Junior Division	Language Arts	
		Mathematics	
		Art	
		Music	
		French	
		Science	
		Physical Education	
		Health	
		Social Studies	
Intermediate Division	Communications	Language Arts	
		French	
	Social Science	History	
		Geography	
	Pure and Applied Science	Mathematics	
		Science	
	Arts	Industrial Arts	
		Home Economics	
		Music	
		Physical Education	
		Theatre Arts	
Secondary Division	Communications	English	
		French	
		German	
		Italian	
		Latin	

TABLE 3 (cont'd)

FUNCTION	SCHOOL PROGRAM	SUB-PROGRAM	SUB-SUB-PROGRAM
INSTRUCTION			
Secondary Division (cont'd)	Social Sciences	History	
		Geography	
		Economics	
		Man in Society	
		World Politics	
	Pure and Applied Sciences	Mathematics	
		Sciences	
		Accounting	
		Data Processing	
		Secretarial	
		Business Law	
		Technical Education	
		Building Trades	
		Quantity Cooking	
		Drafting	
		Marketing	
		Business Organization and Management	
	Arts	Music	
		Art	
		Industrial Arts	
		Theatre Arts	
		Graphic Arts	
		Physical and Health Education	
		Mass Media	
		Screen Education	
		Home Economics	
EDUCATIONAL SERVICES	Guidance		
	Resource Centre		
	Instructional Materials		
	Pupil Welfare		
	Special Services		

In order to assist teachers with their task of writing their own sub-sub-program goals, objectives, and means of evaluation, two major projects have been undertaken, one at the elementary, and laterally, another at the secondary level of education. A group of Ad Hoc Elementary School Writers, under the direction of the Superintendent of Business, and the Ad Hoc Secondary Writers Committee, under the direction of a Secondary School principal, have written model submissions portraying the goals, objectives, descriptions and means of evaluation for all the elementary and secondary school programs and sub-programs in the Board of Education for the Borough of York. These model submissions, currently undergoing a thorough editing analysis, will be ready for printing and distribution to each school in the Board by the end of January, 1972.

Not only will these model program and sub-program submissions assist individual teachers in writing the required information for their own sub-sub-programs, they will also serve as guidelines against which each teacher may measure his or her own goals to check for curriculum consistency. It should be pointed out that this whole program structure effort is aimed at describing the structure as it exists now. Hopefully, once the MER planning system is launched in September of 1972, this entire program structure will be periodically reviewed and altered whenever necessary.

7 - PROGRAM COSTS

The ultimate aim of the program costing section of MERS is to be able to calculate the costs of any individual sub-sub-program in the Board of Education for the Borough of York, and of any logical combination of sub-sub-programs, sub-programs, and programs. Once MERS becomes fully operational in September of 1972, costs will be calculated for each school in the Borough of York as well as for the Board Office, according to appropriate Metropolitan Toronto School Board budget function and object classification codes. These budgetary costs will then be allocated amongst the schools in the following manner:

1 - Board Office costs to be pro-rated amongst the schools, based on the number of students enrolled in each sub-sub-program of each school.

2 - Individual school costs to be pro-rated amongst the sub-sub-programs of each school based on one of:-
    a - student sub-sub-program contact hours
    b - staff sub-sub-program contact hours
    c - space sub-sub-program contact hours

There is virtually no limit to the amount of sophistication that may be used in allocating total educational costs among sub-sub-programs of a school. Undoubtedly, the future experience of the York Board will suggest many alterations in these cost allocation criteria. In the meantime, however, the above costing procedure will be attempted along a three phase approach.

In Phase 1, the costs of each school will be calculated as follows: expenditures for each budget function will be broken down into one of (a) salaries, (b) other, or (c) overhead. This phase has been completed by the Data Processing Department of the York Board. A sample report is shown in Table 4.

In Phase 2, these costs will be allocated amongst Borough of York programs based on contact hour data within the schools. This phase has already begun. In Phase 3, costs will be allocated based on actual sub-sub-program contact hour data that will be collected from each school.

Although some computer programming modifications are necessary to enable existing computer programs to perform Phase 2 and Phase 3 calculations, the bulk of the work required in this section of MERS is in the area of data collection and verification. Special documents will be written and training sessions will be held for each school MERS Planning Committee so that it may co-ordinate the collection of data under the auspices of the Data Processing Department. These training sessions are planned for May of 1972.

All computer programming modifications will be completed well before the scheduled launch of MERS in September of 1972. The collection of actual sub-sub-program contact hour data from each school will coincide with the system launch.

8 - PROGRAM EVALUATIONS

Decisions regarding the curriculum programs that will

YORK BOARD OF EDUCATION

PROGRAM COSTING

SCHOOL BUDGET SUMMARY

REPORT # 4

DATE: 1971

PAGE: 1

-- SCHOOL --- CODE	NAME	BUDGET FUNCTION CODE	NAME	SCHOOL COSTS SALARIES	OTHER	OVERHEAD
01	101 BALA	0	INSTRUCTION	216,216	11,994	68,810
		1	ED SERVICES		2,726	3,754
		2	PUP WELFARE			905
		3	ADMIN			17,807
		4	COMP SERVICE			3,343
		5	PLANT OPERTN	23,858	7,685	14,841
		6	PLANT MTCE		33,271	17,634
		7	TRANSPORTN		1,780	1,209
		9	OTHER SERV		100	290
02	104 BRIAR HL	0	INSTRUCTION	130,508	10,112	47,776
		1	ED SERVICES		2,812	2,606
		2	PUP WELFARE		300	628
		3	ADMIN			12,364
		4	COMP SERVICE			2,321
		5	PLANT OPERTN	16,286	7,850	10,305
		6	PLANT MTCE		12,061	12,244
		7	TRANSPORTN		1,525	839
		9	OTHER SERV		101	201
03	105 ARLINGTN	0	INSTRUCTION	357,466	20,339	75,892
		1	ED SERVICES		6,385	4,140
		2	PUP WELFARE		300	998
		3	ADMIN			19,639
		4	COMP SERVICE			3,687
		5	PLANT OPERTN		9,785	16,369
		6	PLANT MTCE		13,281	19,449
		7	TRANSPORTN		1,930	1,333
		9	OTHER SERV		145	520
04	110 C E WEBS	0	INSTRUCTION	244,677	12,588	70,078
		1	ED SERVICES		3,692	3,623
		2	PUP WELFARE		300	922
		3	ADMIN			18,135
		4	COMP SERVICE			3,404
		5	PLANT OPERTN	31,429	8,010	15,115
		6	PLANT MTCE		19,011	17,959
		7	TRANSPORTN		3,705	1,231
		9	OTHER SERV		100	296

TABLE 4

SAMPLE OF PHASE 1 OUTPUT REPORT

be established in the classrooms of the York Board will not be made on the basis of costs alone. MERS will facilitate the collection of a number of evaluative data that will be used to complement the cost factors for such program decisions. It is anticipated that the evaluative input into curriculum decision-making processes should be provided by the classroom teachers, the York "community" and the Board Administration, as well as the Ontario Department of Education.

A separate body, the Community Communications Committee, has been struck to consider, among other items, ways and means of ascertaining trustee, parent, and student evaluations of the programs offered by the Board of Education for the Borough of York. Within the Metropolitan Toronto School Board, other member boards have already conducted similar surveys and published their findings. It is possible that the Community Communications Committee will consider a similar pattern but up to now, the committee has spent its time in defining its role more clearly.

The philosophy of MERS is to attribute as much importance to the evaluations of curriculum made by individual classroom teachers as possible. MERS will be a workable system, regardless of the quality of these evaluations, because it is assigning an important decision-making role to the classroom teacher. But it can only lead to better educational curricula if teacher evaluations are as accurate and objective as possible. The Borough of York is spending a major share of its MERS resources over the next five months to strengthen this aspect

of evaluation. As will be explained in the next section, each teacher will be thoroughly versed in the writing of instructional objectives before he or she begins to define goals, objectives, and means of student evaluation for individual classroom sub-sub-programs. In addition, the Learner Characteristics Committee is expected to contribute information to the teachers regarding various socio-economic, demographic, and ethnic traits of Borough of York students that might help teachers both in tailoring curriculum programs to specific student groups and in evaluating student progress. It is expected that the Learner Characteristics Committee will remain a continuing resource even after the MER system is launched. It will serve as additional support to the Superintendent of Program and the Research and Development Officer in their attempts to encourage the consideration of alternative programs in the classrooms of York through the continual documentation of research evidence.

9 - STAFF TRAINING AND IMPLEMENTATION

The value of an extensive training program before implementing MERS was recognized quite early by the MERS Planning Committee. The need to meet often with its own committees, with the Borough's principals, and with the classroom teachers was given a high priority within the schedule of MERS activities.

Committees have been subjected to many short sessions on the philosophy of MERS in order to keep participants in tune with its aims. The York Board principals are viewed by

MERS as the single most important set of people in the system. They are the leaders and motivators of their teaching staffs, and with commitment to the urgency and utility of implementing the MER system, the overall operation will have a good prospect for success. Part of the Principals' Fall Conference at Geneva Park, Ontario, was taken up by a workshop approach to understanding the many facets of MERS. Since then, Board officials have taken portions of the regular York Board Principals' meetings to re-introduce the concepts of MERS.

In an effort to implement the MER system as soon as feasible, it was proposed by a sub-group of the MERS Planning Committee that the school by school implementation process be co-ordinated by a School MERS Planning Committee within each school, chaired by the principal. The immediate job of the School MERS Committees will be to carry out the training of their own school staffs in the area of instructional objectives, and thereafter to supervise the detailed documentation of sub-sub-program descriptions, goals, objectives, and means of evaluation for each individual teacher before the end of June, 1972. Accordingly, principals will meet sometime in February for the joint purpose of learning the utility of instructional objectives and proposing ways of forming School MERS Planning Committees.

The biggest current task of the MERS implementation program concerns the orientation of teachers into a knowledge of the system. The Implementation Committee is carrying out

a school by school question and answer session in order to clarify teachers' conceptions about MERS and to elicit their responses. It is hoped that this series of 35 one hour sessions will be completed by the end of February, one at each of the Borough's schools. Thereafter, the Implementation Committee will concentrate on informing each of the School MERS Planning Committees in the writing of instructional objectives. Once School MERS Planning Committees are operational, the Implementation Committee will serve a resource function in assisting with the instructional objective training sessions that each School MERS Planning Committee will sponsor.

10 - OVERALL MERS CONTROL PROCESSES

It can be said that the totality of MERS activities engaged in to date has only laid down the information base foundation on which to analyse curriculum program decisions, current or future. Indeed, the current schedule of activities, depicted in Table 5, deal solely with collecting the data necessary to support the MER planning system, once it is launched in September, 1972. But what is to be done with all this information?

No doubt some thought should have been directed at the processes that will use this information to make curriculum program decisions, but it was felt such efforts might delay the launch of the project as well as restricting the types of data that would be collected. But now that the

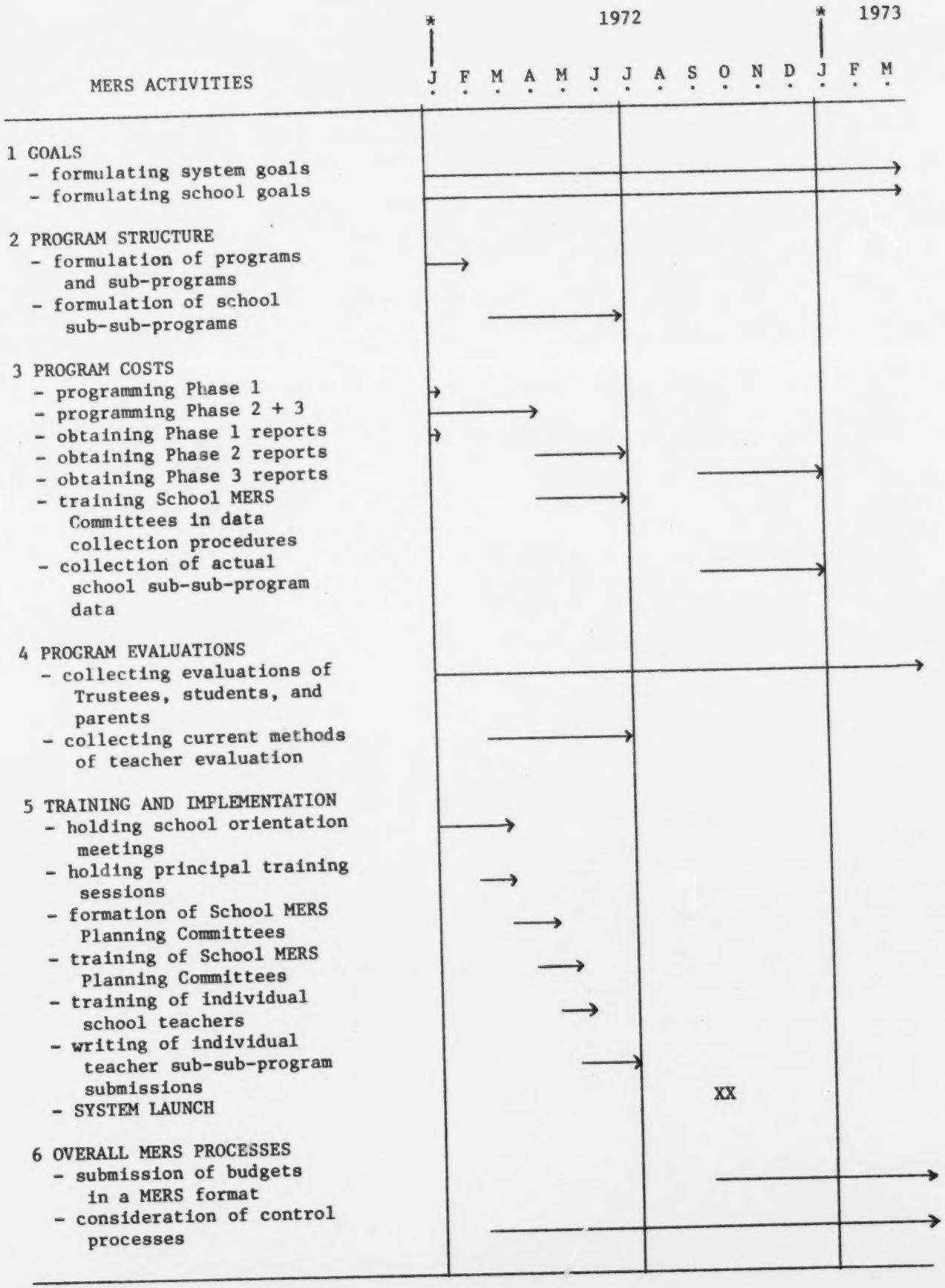

1972
1973
MERS ACTIVITIES
J F M A M J J A S O N D J F M
1 GOALS
- formulating system goals
- formulating school goals
2 PROGRAM STRUCTURE
- formulation of programs and sub-programs
- formulation of school sub-sub-programs
3 PROGRAM COSTS
- programming Phase 1
- programming Phase 2 + 3
- obtaining Phase 1 reports
- obtaining Phase 2 reports
- obtaining Phase 3 reports
- training School MERS Committees in data collection procedures
- collection of actual school sub-sub-program data
4 PROGRAM EVALUATIONS
- collecting evaluations of Trustees, students, and parents
- collecting current methods of teacher evaluation
5 TRAINING AND IMPLEMENTATION
- holding school orientation meetings
- holding principal training sessions
- formation of School MERS Planning Committees
- training of School MERS Planning Committees
- training of individual school teachers
- writing of individual teacher sub-sub-program submissions
- SYSTEM LAUNCH
XX
6 OVERALL MERS PROCESSES
- submission of budgets in a MERS format
- consideration of control processes

TABLE 5 SCHEDULE OF MERS ACTIVITIES

emergence of a very general information base is foreseen, the time has come to structure cyclical planning, programming, budgeting, and evaluation methods. The next task of the MERS Planning Committee is to establish groups that will recommend ways and means of performing the following functions:

1 - Evaluating and revising system-wide goals.

2 - Making intra-school curriculum program decisions and appropriate re-allocations of resources.

3 - Co-ordinating inter-school curriculum program offerings.

4 - Making inter-school decisions regarding re-allocations of resources.

Though it was felt that such processes could be deferred, the imminent launching of MERS makes the consideration of such questions an immediate priority of the MERS Planning Committee.

As the experience gained by all staff members of the Board of Education for the Borough of York increases, the focus of MERS will justifiably shift from a critique of current curriculum programs to a planning for medium to long range future curriculum programs. As this occurs, consideration will have to be given to expanding the computer processing support that MERS will have when it begins in September of 1972. These modifications will be necessary to simulate future conditions within the York Board in order that future planning decisions may be made with as objective informational input as possible. The formation of a Committee to study this future computer support is premature at this time. The recommendations made

by the bodies that consider the above four areas will provide a great deal of the problem structure for any computer hardware and software planning body.

11 - PROJECT OBSERVATIONS

The report would not be complete without at least a summary of observations gathered from a variety of sources about the progress enjoyed by the MERS project to date. This section contains a sprinkling of the more widely recognized observations.

1. The principal and his staff are key personnel in the successful implementation of any planning system like MERS. Unless they are given a share of automony and control, MERS constitutes only a budgetary tool. Some persons have been found to be anxious individuals whenever the topic of MERS is discussed.

2. People, generally, are resistant to change, particularly if they do not understand the consequences involved. Though some principals were involved with MERS policy-making through participation on committees from the start, it may have been more expedient to have held teacher orientation sessions and to have offered them more participation in MERS committees at an earlier date. However, expediency in the establishment of a systems approach must also be considered.

3. All groups and committees within the MER system have had difficulty both grasping and maintaining correct concepts about MERS and the specific tasks that their groups and

committees were expected to perform. When groups and committees did not meet frequently enough, much re-learning was necessary in subsequent sessions before they were able to break new ground. It is possible that a continuous process of exposure to MERS would have been a better approach to take.

4. Problems developed with respect to the MERS committees that the Planning Committee struck. A first set of problems had to do with the purposes that these committees were established to serve. Some members felt that such purposes were either premature, unrelated to MERS, or perhaps a combination of both. The Community Communications Committee, for instance, has met only once, thinking that its role is a future one. The Implementation Committee met three times before it had established its purpose.

5. The importance of staff personnel who understand the concepts of MERS holding places on committees and performing liaison functions for committees with the schools cannot be over-emphasized. The participation of individuals who have high visibility in leadership roles in the System seems to be an essential component for the implementation of MERS.

6. It is also noted that the Metropolitan Toronto School Board and Region Seven of the Department of Education have provided useful input into the MERS project, as well as receiving benefits from the way MERS has evolved. The Region Seven office, for example, has undertaken a program wherein each member wrote his own goals, objectives, and means of

evaluation, in instructional objective notation.

7. Finally, it should be noted that progress with the implementation of MERS has proceeded with rapidity since the middle of December, 1971. No doubt some of this speed can be attributed to the increasing interest of the Ontario Department of Education in drawing up PPBES guidelines for the school boards in the province.

MERS PLANNING COMMITTEE

The central organizing and planning committee for the MERS project in York.

MEMBERS (17)

CUTHBERT, C.D.	Superintendent of Program (Chairman)
BABBIN, J.	Systems Procedures Officer, Metro School Board
ELDER, Miss J.	Co-ordinator of Guidance
GILLESPIE, A.G.	Director of Education
GRAHAM, J.R.	Program Consultant - Region Seven, Ontario Department of Education
GREENFIELD, Dr. T.B.	Associate Professor - O.I.S.E.
HARMAN, Dr. W.	Project Officer - MERS
HODGINS, D.R.	Principal - Vaughan Road Collegiate Institute
HUFF, F.	Chief Accountant
JAMES, W.L.G.	Superintendent of Business
MACLEAN, A.	Co-ordinator of Mathematics
MCTEAGUE, N.F.	Co-ordinator of English
RICHARDS, H.	Assistant Superintendent of Instruction
ROSS, J.D.	Principal - Harwood Junior Public School
SPENCER, R.L.	Manager, Computer Services
SUBOTINCIC, M.	Principal - C.E. Webster Junior Public School
ZIEGLER, DR. S.	Research and Development Consultant

COMMITTEE TO IDENTIFY LEARNER CHARACTERISTICS

Ways and means of identifying learner characteristics that should be considered in planning school programs.

MEMBERS (11)

ELDER, Miss J.	Co-ordinator of Guidance (Chairman)
BARKER, F.	Assistant Superintendent of Instruction
CARVETH, Mrs. E.	Psychological Services
CUTHBERT, C.D.	Superintendent of Program
GILLESPIE, A.G.	Director of Education
HARMAN, Dr. W.	Project Officer - MERS
MADELEY, R.A.	Program Consultant - Region Seven, Ontario Department of Education
MANN, I.	Social Worker
ROSS, J.D.	Principal - Harwood Junior Public School
SEMENIUK, Mrs. M.	Special Services Consultant
ZIEGLER, Dr. S.	Research and Development Consultant

COMMITTEE TO IMPLEMENT INSTRUCTIONAL OBJECTIVES

Ways and means to implement instructional objectives on a school-to-school basis.

MEMBERS (25)

SUBOTINCIC, M.	Principal - C.E. Webster Junior Public School (Chairman)
AHMET, N.	Vice-Principal - York Humber High School
BRADBURY, Miss S.	Teacher - Kane Senior Public School
BRIEN, R.E.	Senior Consultant - Physical Education
CHRISTOPHER, J.H.	Co-ordinator of Science
DOIDGE, Mrs. B.	Senior Psychologist
GILLESPIE, A.G.	Director of Education
GRAHAM, J.R.	Program Consultant - Region Seven, Ontario Department of Education
GREEY, Mrs. J.	Primary Consultant
HANMER, J.D.	Superintendent of Instruction
HARMAN, Dr. W.	Project Officer - MERS
HODGINS, D.R.	Principal - Vaughan Road Collegiate Institute
HUGHES, L.R.	Co-ordinator of the Arts
JACK, J.M.	Assistant Superintendent of Instruction
MACLEAN, A.	Co-ordinator of Mathematics
MCCUAIG, Miss M.	Co-ordinator of Modern Languages and Latin
MCTEAGUE, N.F.	Co-ordinator of English
PAYNE, R.	Head of English - George Harvey Secondary School
PHILLIPS, D.J.	Assistant Superintendent of Program
RICHARDS, H.	Assistant Superintendent of Instruction
ROSS, Miss D.	Teacher - Memorial Junior Public School
SMITH, D.	Vice-Principal - Silverthorn Junior Public School
TROPEA, Miss E.	Special Services Consultant
WENT, J.	Psychological Services
ZIEGLER, Dr. S.	Research and Development Consultant

COMMUNITY COMMUNICATIONS COMMITTEE

Ways and means to communicate with the community.

MEMBERS (17)

CUTHBERT, C.D.	Superintendent of Program (Chairman)
BARBOUR, D.H.	Assistant Superintendent of Program
BATES, W.	Mathematics Teacher - George Harvey Secondary School
BERKETA, M.	Principal - Warren Park Junior Public School
CHITTICK, K.	Head of Guidance - Vaughan Road Collegiate Institute
DUNELYK, L.	Program Consultant - Region Seven Ontario Department of Education
FERGUSON, P.H.C.	Principal - Frank Oke Vocational School
GILLESPIE, A.G.	Director of Education
GIOIA, C.	Vice-Principal - Memorial Junior Public School
GREENFIELD, Dr. T.B.	Associate Professor - O.I.S.E.
HARMAN, Dr. W.	Project Officer - MERS
MCDONALD, M.J.	Trustee - Chairman of Information and Relations Committee - York Board of Education
NEVING, W.S.	Principal - C.R. Marchant Senior Public School
RICHARDS, H.	Assistant Superintendent of Instruction
TRUSS, G.	Publications Officer
WENGLE, H.H.	Trustee - Chairman of Program and Instruction Committee - York Board of Education
ZIEGLER, Dr. S.	Research and Development Consultant

AD HOC SECONDARY SCHOOL WRITERS' COMMITTEE

The writing of goals, objectives and programs in the various secondary schools.

MEMBERS (28)

HODGINS, D.R.	Principal - Vaughan Road Collegiate Institute (Chairman)
BARBOUR, D.H.	Assistant Superintendent of Program
BONGARD, Mrs. C.	Head of Girls' Physical Education - Vaughan Road Collegiate Institute
CHANONHOUSE, Miss A.	Head of Commercial - Runnymede Collegiate Institute
CHRISTOPHER, J.H.	Co-ordinator of Science
CRAFT, J.	Head of History - George Harvey Secondary School
CUTHBERT, C.D.	Superintendent of Program
DELINE, Mrs. N.	Librarian - Vaughan Road Collegiate Institute
ELDER, Miss J.	Co-ordinator of Guidance
GILLESPIE, A.G.	Director of Education
GREENFIELD, Dr. T.B.	Associate Professor - O.I.S.E.
HARLOW, G.	Head of Boys' Physical Education - York Memorial Collegiate Institute
HARMAN, Dr. W.	Project Officer - MERS
JONES, J.F.	Vice-Principal - George Harvey Secondary School
LEE, Miss J.	Head of Geography - Runnymede Collegiate Institute
MACLEAN, A.	Co-ordinator of Mathematics
MCARTHUR, Miss E.M.	Vice-Principal - Vaughan Road Collegiate Institute
MCCARTNEY, H.	Head of Technical Department - Weston Collegiate Institute
MCCUAIG, Miss M.	Co-ordinator of Modern Languages and Latin
MCTEAGUE, N.F.	Co-ordinator of English
MELVILLE, K.	Head of Physics - Vaughan Road Collegiate Institute
MILLER, J.	Co-ordinator of Instructional Materials
PASTERNACK, E.	Co-ordinator of Special Services
POWELL, G.	Head of History - Vaughan Road Collegiate Institute
PETRUSHCHAK, J.	Assistant Head of Boys' Physical Education - George Harvey Secondary School
SMALLEY, M.	Technical Director - York Humber High School
WONG, J.	Head of Restaurant Services - York Humber High School
ZIEGLER, Dr. S.	Research and Development Consultant

AD HOC ELEMENTARY SCHOOL WRITERS' COMMITTEE

The writing of goals, objectives and programs in the various elementary schools.

MEMBERS (21)

JAMES, W.L.G.	Superintendent of Business (Chairman)
BLAKE, G.	Attendance Counsellor
BRIEN, R.E.	Senior Consultant - Physical Education
CHRISTOPHER, J.H.	Co-ordinator of Science
ELDER, Miss J.	Co-ordinator of Guidance
GILLESPIE, A.G.	Director of Education
GREEY, Mrs. J.	Primary Consultant
HARMAN, DR. W.	Project Officer- MERS
HUGHES, L.R.	Co-ordinator of the Arts
MACLEAN, A.	Co-ordinator of Mathematics
MCCUAIG, Miss M.	Co-ordinator of Modern Languages and Latin
MCTEAGUE, N.F.	Co-ordinator of English
MILLER, J.	Co-ordinator, Instructional Materials Centre
PASTERNACK, E.	Co-ordinator of Special Services
PHAIR, Mrs. S.	Teacher - Home Economics - Arlington Senior Public School
PHILLIPS, D.J.	Assistant Superintendent of Program
RICHARDS, H.	Assistant Superintendent of Instruction
SINCLAIR, Miss B.	Music Consultant
SPROUL, Mrs. S.	Teacher - Home Economics - Arlington Senior Public School
WESTON, Miss M.	Library Consultant
ZIEGLER, Dr. S.	Research and Development Consultant

BUDGET COMMITTEE

Preparation of the 1972 budget on a MERS format.

MEMBERS (6)

JAMES, W.L.G.	Superintendent of Business (Chairman)
BABBIN, J.	Systems Procedures Officer, Metro School Board
GILLESPIE, A.G.	Director of Education
HARMAN, DR. W.	Project Officer, MERS
HUFF, F.	Chief Accountant
SPENCER, R.L.	Manager, Computer Services

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